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EXAMINER McCORMICK, GABRIELLE A				
ART UNIT		PAPER NUMBER		
3629				
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**Please find below and/or attached an Office communication concerning this application or proceeding.**

The time period for reply, if any, is set in the attached communication.

### Office Action Summary

**Application No.**

10/663,372

**Applicant(s)**

BERINGER ET AL.

**Examiner**

Gabrielle McCormick

**Art Unit**

3629

**Period for Reply** -- The MAILING DATE of this communication appears on the cover sheet with the correspondence address --

A SHORTENED STATUTORY PERIOD FOR REPLY IS SET TO EXPIRE 3 MONTH(S) OR THIRTY (30) DAYS, WHICHEVER IS LONGER, FROM THE MAILING DATE OF THIS COMMUNICATION.

- Extensions of time may be available under the provisions of 37 CFR 1.136(a). In no event, however, may a reply be timely filed after SIX (6) MONTHS from the mailing date of this communication.
- If NO period for reply is specified above, the maximum statutory period will apply and will expire SIX (6) MONTHS from the mailing date of this communication.
- Failure to reply within the set or extended period for reply will, by statute, cause the application to become ABANDONED (35 U.S.C. § 133). Any reply received by the Office later than three months after the mailing date of this communication, even if timely filed, may reduce any earned patent term adjustment. See 37 CFR 1.704(b).

**Status**

- 1) ☒ Responsive to communication(s) filed on 22 December 2009.
- 2a) ☐ This action is **FINAL**. 2b) ☒ This action is non-final.
- 3) ☐ Since this application is in condition for allowance except for formal matters, prosecution as to the merits is closed in accordance with the practice under *Ex parte Quayle*, 1935 C.D. 11, 453 O.G. 213.

**Disposition of Claims**

- 4) ☒ Claim(s) 1-26, 28, 30, 32 and 34-36 is/are pending in the application.
- 4a) Of the above claim(s) \_\_\_\_\_ is/are withdrawn from consideration.
- 5) ☒ Claim(s) 1 is/are allowed.
- 6) ☒ Claim(s) 1-26, 28, 30, 32 and 34-36 is/are rejected.
- 7) ☐ Claim(s) \_\_\_\_\_ is/are objected to.
- 8) ☐ Claim(s) \_\_\_\_\_ are subject to restriction and/or election requirement.

**Application Papers**

- 9) ☐ The specification is objected to by the Examiner.
- 10) ☐ The drawing(s) filed on \_\_\_\_\_ is/are: a) ☐ accepted or b) ☐ objected to by the Examiner.
- Applicant may not request that any objection to the drawing(s) be held in abeyance. See 37 CFR 1.85(a). Replacement drawing sheet(s) including the correction is required if the drawing(s) is objected to. See 37 CFR 1.121(d).
- 11) ☐ The oath or declaration is objected to by the Examiner. Note the attached Office Action or form PTO-152.

**Priority under 35 U.S.C. § 119**

- 12) ☐ Acknowledgment is made of a claim for foreign priority under 35 U.S.C. § 119(a)-(d) or (f).
- a) ☐ All b) ☐ Some \* c) ☐ None of:
1. ☐ Certified copies of the priority documents have been received.
  2. ☐ Certified copies of the priority documents have been received in Application No. \_\_\_\_\_.
  3. ☐ Copies of the certified copies of the priority documents have been received in this National Stage application from the International Bureau (PCT Rule 17.2(a)).

\* See the attached detailed Office action for a list of the certified copies not received.

**Attachment(s)**

- 1) ☒ Notice of References Cited (PTO-892)
- 2) ☐ Notice of Draftperson's Patent Drawing Review (PTO-948)
- 3) ☐ Information Disclosure Statement(s) (PTO/SB/08)
- 4) ☐ Interview Summary (PTO-413)
- 5) ☐ Notice of Informal Patent Application
- 6) ☐ Other: \_\_\_\_\_
- Paper No(s)/Mail Date \_\_\_\_\_

## **DETAILED ACTION**

### ***Status of Claims***

1. This action is in reply to the amendment filed on December 22, 2009.
2. Claims 1, 10-11, 14-15 and 23-26 have been amended.
3. Claims 35-36 have been added.
4. Claims 1-26, 28, 30, 32, 34 and 35-56 are currently pending and have been examined.

### ***Continued Examination Under 37 CFR 1.114***

5. A request for continued examination under 37 CFR 1.114, including the fee set forth in 37 CFR 1.17(e), was filed in this application after final rejection. Since this application is eligible for continued examination under 37 CFR 1.114, and the fee set forth in 37 CFR 1.17(e) has been timely paid, the finality of the previous Office action has been withdrawn pursuant to 37 CFR 1.114. Applicant's submission filed on December 22, 2009 has been entered.

### ***Claim Objections***

6. The Examiner notes that claim 1 is now presented without the double "the", however, this amendment to the claim was not made through any notation, such as through striking out and is therefore non-compliant. Applicant should reply with an amendment that properly shows this amendment.

### ***Claim Rejections - 35 USC § 112***

7. The following is a quotation of the first paragraph of 35 U.S.C. 112:

The specification shall contain a written description of the invention, and of the manner and process of making and using it, in such full, clear, concise, and exact terms as to enable any person skilled in the art to which it pertains, or with which it is most nearly connected, to make and use the same and shall set forth the best mode contemplated by the inventor of carrying out his invention.

8. Claims 1-26, 28, 30, 32, 34 and 35-56 are rejected under 35 U.S.C. 112, first paragraph, as failing to comply with the written description requirement. The claims contain subject matter which was not described in the specification in such a way as to reasonably convey to one skilled in the relevant art that the inventor(s), at the time the application was filed, had possession of the claimed invention.
9. Applicant has amended the claims to incorporate the following limitation: *...implementing a dashboard in the user profile...*
10. The specification discloses that the dashboard is provided by UI tool 760 (P[0049]) which is part of enterprise management consolidation system 700 (P[0044]). The dashboard is not disclosed to be located in the user profile therefore this location information with respect to the dashboard is new matter.
7. Applicant's amendments to claims 1, 14, 25 and 26 overcome the previous rejections under 112, first paragraph.

### ***Claim Rejections - 35 USC § 103***

8. The following is a quotation of 35 U.S.C. 103(a) which forms the basis for all obviousness rejections set forth in this Office action:

A patent may not be obtained though the invention is not identically disclosed or described as set forth in section 102 of this title, if the differences between the subject matter sought to be patented and the prior art are such that the subject matter as a whole would have been obvious at the time the invention was made to a person having ordinary skill in the art to which said subject matter pertains. Patentability shall not be negated by the manner in which the invention was made.

16. Claims 1-4, 8-15, 19-26, 28, 30, 32 and 34-36 are rejected under 35 U.S.C. 103(a) as being unpatentable over Howard et al. (US Patent No. 6,697,865 hereafter referred to as "Howard") in view of Case et al. (US Pub. No. 2003/0154180, hereinafter referred to as "Case") in view of Cheah (US Pat. No. 7,003,546) in view of Waller et al. (US Pub. No. 2001/0047293, hereinafter referred to as "Waller") in view of Eisenhart (US Pub. No. 2001/0047276) in view of MacIntyre et al. (US Pub. No. 2003/0144868, hereinafter referred to as "MacIntyre").

17. **Claims 1, 8 and 25:** Howard discloses providing portals that simultaneously “present a single coordinated image to selling partners and customers while providing custom experiences for individual users.” (C2; L9-11). Howard discloses “relationship portal software” and “business database” (C2; L35-47: *machine readable instructions*). Howard also discloses an example of context information where a sales person manages the permissions for users, one of which is a lawyer. The sales person can set the lawyer’s permissions, but would not have access to the legal content. (C8; L9-13). Thus, the lawyer has access to legal content (and therefore the context information appropriate to a lawyer’s permissions). Additionally, Howard discloses:

- *generating a user profile corresponding to a user;* (C4; L35-42)
- *identifying one or more entities related to the user, said one or more entities having corresponding entity profiles including context information comprising a plurality of types of categorization data;* (C4; L27-35: The company (i.e., entity/parent) profile includes demographic data, lists of affiliated companies, a list of permissions that users can be given, and a list of users who are allowed to manage the profile. These are examples of a plurality of types of categorized data.)
- *providing an initial list including entity profiles corresponding to one or more entities related to the user;* (Appendix B: “select user”: user examines a list of users he may access (thus, the access permission provides how the entity is related to the user). As each user has a profile, the viewing of the user inherently comprises the user profile. Additionally, Appendix B at “company Organization” discloses that organizational information is used as an attribute of each user and is leverage by portal applications).
- *select an entity profile from the entity profiles included in the initial list;* (Appendix B: “select user”: user examines a list of users he may access)
- *associating at least a portion of the context information from the one or more related entity profiles to the user profile by importing at least the portion of the context information into the user profile, wherein the imported portion comprises data belonging to the plurality of types of categorized data;* (C2; L42-48: relationships between parties are regulated to the extent that

the relationship involves the portal-providing company's (i.e., an example of a parent company) information: thus, parent company information (i.e., context information) is provided (i.e., imported) to a child company thru the relationship. C2; L8-11: the interaction of the portal providing company and other companies results in presenting a "single coordinated image" while providing custom experiences for individual users, Thus describing the functionality such that context information is imported into a user profile such that the user views the "single coordinated image" while also having a custom experience (i.e., one that results from the user's preferences from the user's profile). C5; L38-50: "Once the permission has been given to a group it is automatically conferred on all members of that group...Any user who becomes a member of a group immediately acquires all the permissions that have been given to the group. The use of groups simplifies administration of permission by enabling a large number of permissions to easily be assigned by putting users in just a few groups." The "permissions" constitute an example of categorized context information from the plurality of types of categorized data listed at C4; L27-35 (The company (i.e., entity/parent) profile includes demographic data, lists of affiliated companies, a list of permissions that users can be given, and a list of users who are allowed to manage the profile. These are examples of a plurality of types of categorized data.) The step of immediately acquiring group permissions by users discloses the importing (i.e., transporting or inheriting) of the context information into the profile of the user. (C4; L35-41: A user profile includes demographic data, permissions and preferences, therefore, the user profile contains a plurality of types of categorized data. C4; L44-46: "the maximum permissions available to a user are limited by the permission assigned to the user's company" thus, the categorized data of permissions is imported and associated with the user's profile.) C7; L67-C8; L4: a selling partner of the portal-providing company can create personalized branded web sites for its customers and can reuse (i.e., import) information available on the portal-providing company's portal.)

- *personalizing a work environment associated with user based on the context information associated with the user profile.* (C2; L56-67: a personal relationship portal that has custom appearances and behaviors for each of the employees). Permissions are provided to modify profiles (C6; L40-50).
18. Howard explicitly discloses that permissions of a user are based on group or company permissions and are therefore imported/inherited from that parent. These permissions impact the accessibility of the user to various types of data. Howard does not explicitly disclose importing at least an additional type of data from an at least type of categorized data because this is accomplished by the permissioning.
19. Case discloses that a user profile is generated based on the job description of the user such that the interests and memberships associated with the user group having a particular job description are assigned to the user. (P[0033]). Roles have profiles that are included in the relevant user's profile. (P[0041-0042]). Case further discloses that all members of a team (i.e., people working on the same project) are assigned an identical profile. (P[0092]). This discloses importing categorized data that belongs to a group membership, an information need of the user, a project of the user and a task on the user.
20. Therefore, it would have been obvious to one of ordinary skill in the art at the time of the invention to have included explicitly importing other aspects of a profile to a user's profile, such as a group membership and a project, as disclosed by Case, in the system of Howard for the motivation of conveniently assigning certain interests and memberships of user groups as a function of their job description. (Case; P[0033]). Howard discloses that the user interface presented to a given user depends on the user's role and on user and company profiles. (C12; L38-41). Therefore, it is obvious to expand Howard to explicitly define that the permissioning that is imported to a user profile based on a role includes other profile information associated with the role.
21. Note: Though the Examiner has applied art to the category of authorization level, the various categories of data (qualifications, skills, workset, preferences, authorization level, group memberships, informational needs, projects, tasks, taxonomies and accessed content) are

**nonfunctional descriptive data** and are not functionally involved in the steps recited. **The importing of categorized data would be performed regardless of descriptions of the categories.** Thus, this descriptive data will not distinguish the claimed invention from the prior art in terms of patentability, *see In re Gulack*, 703 F.2d 1381, 1385, 217 USPQ 401, 404 (Fed. Cir. 1983); *In re Lowry*, 32 F.3d 1579, 32 USPQ2d 1031 (Fed. Cir. 1994).

22. Therefore, it would have been obvious to one of ordinary skill in the art at the time the invention was made to have included various specified categories of data because such data does not functionally relate to the steps in the method claimed and because the subjective interpretation of the names of the categories does not patentably distinguish the claimed invention.
23. Howard does not disclose *sending, by the processor, a notification to the user to indicate that new context information is available for updating into the user profile, wherein the identity inspector tool provides: a first option to the user to accept the new information for updating user profile based on the new information; a second option to the user to change the new information for updating the user profile based on the changed new information; and a third option to the user to add additional information to the new information for updating the user profile based on the additional information.*
24. Cheah discloses notification to the user that new information is available for importation into the user profile (C19; L19-22 and C25; L52-57). Options are presenter to the user to either accept the request to exchange (C19; L36-38) or to accept the request with limitation (C19; L64-65) where the user enters the limits for the exchange (C20; L2-5). The acceptance with adding limitations is the equivalent of the third option of adding additional information to the new information. Cheah further discloses that importing data from a database "results in substantial time savings" (C33; L46-49). Note: the process of importing new or additional data into the user profile results in updating the user profile with the imported information.
25. Therefore, it would have been obvious to one of ordinary skill in the art at the time of the invention to have included notification and options for updating as disclosed by Cheah, in the system of Howard for the motivation of providing a user control over additions to profile information. It is



obvious to allow a user to control who has access to his contact information, therefore the options of allowing a user to determine to accept or accept with limitations afford that control. Notifications are obvious to ensure timely responses to requests.

26. Cheah does not explicitly disclose a user changing the new context information.
27. Waller discloses changing the format of data prior to importation (P[0166-0168]).
28. Therefore, it would have been obvious to one of ordinary skill in the art at the time of the invention to have included changing the new information, as disclosed by Waller, in the system of Cheah for the motivation of ensuring that all data remains in a consistent format. For example, it is obvious to ensure that phone information is stored in a consistent format as this enhances the user's ease of use of the data.
29. Howard does not disclose *refining the initial list based on a refining attribute to select an entity*.
30. Eisenhart, however, discloses a collaborative system with a match-making component where members browse a listing of members (P[0011]) and performs matching based on profile information and generates a list of matches that a user can select from. (P[0014]; [0054] and [0060]).
31. Therefore, it would have been obvious to one of ordinary skill in the art at the time of the invention to have included refining a list using a refining attribute, as disclosed by Eisenhart, in the system of Howard for the motivation of grouping individuals in order to work together on a task. (Howard; C1; L50-53). Howard discloses that a user can specify users to be members of a group based on a demographic profile (C5; L43-46), therefore a refining tool aids the user in matching users for selection based on the profile demographics.
32. Howard discloses collaboration among groups of individuals (C1; L50-53) and that users are selected to be part of a group based on profile demographics (C5; L43-46), thus collaborating comprises *using a portion of the context information included in the user profile*. This is also disclosed at C13; L61-67 where permissions are applied through relationship definitions such that a chain of people have a relationship with respect to assembling and delivering content for a

product brochure (i.e., *collaborative tasks defined in the workset*) but will not have a relationship with respect to a different set of activities.

33. Howard does not disclose *receiving an instruction to perform a collaborative task wherein the collaborative task is performed by collaborating with another user in the work environment or tracking progress of the task by implementing a dashboard in the user profile indicating whether a milestone associated with the task is complete.*
34. Eisenhart, however, discloses a secure collaboration manager with presentation interfaces and collaboration tools that store and retrieve information (i.e., an instruction is received to perform a collaborative task) (P[0049]). The secure collaboration manager coordinates functions that include information exchanges and transaction negotiations. The parties (i.e., the collaborating users) can use one user's secure collaboration area as a virtual office for sharing documents, running discussion threads and interacting with parties. (P[0086]). Thus, collaboration is performed *with another user in the work environment*. Eisenhart further discloses a deal tracker component that includes a negotiation manager. (P[0063]). The negotiation manager monitor templates include a listing of every deal (active and complete) and a status listing for all pending requests, etc. (P[0065-0082]). Thus, *tracking progress of the task and indicating whether a milestone is complete.*
35. Therefore, it would have been obvious to one of ordinary skill in the art at the time of the invention to have included performing a collaborative task by collaborating with another user in the work environment and tracking progress milestones, as disclosed by Eisenhart, in the system of Howard for the motivation of expanding Howard to include the functional requirements and benefits of a collaborative tool.
36. Eisenhart does not disclose a dashboard.
37. MacIntyre, however, discloses a dashboard that is updated with the latest information to depict progress toward key success factors. (P[0378-0382]).
38. Therefore, it would have been obvious to one of ordinary skill in the art at the time of the invention to have included a dashboard, as disclosed by MacIntyre, in the system of Eisenhart for the

motivation of providing a workspace that allows real-time monitoring of multiple visualizations, metrics and dimensions. (Eisenhart; P[0379]).

39. **Claims 14, 19 and 26:** Howard discloses providing portals that simultaneously “present a single coordinated image to selling partners and customers while providing custom experiences for individual users.” (C2; L9-11). Howard discloses “relationship portal software” and “business database” (C2; L35-47: *machine readable instructions*). The relationship between the company (parent) and the user (*child*) is disclosed by Howard in column 4; lines 27-29: “a profile for a company to which a user belongs must exist before a profile for the user can be created.” Howard also discloses an example of context information where a sales person manages the permissions for users, one of which is a lawyer. The sales person can set the lawyer’s permissions, but would not have access to the legal content. (C8; L9-13). Thus, the lawyer has access to legal content (and therefore the context information appropriate to a lawyer’s permissions). Additionally, Howard discloses:

- *generating a child entity profile corresponding to a child entity;* (C4; L35-42)
- *identifying a parent entity profile from which the child entity profile depends, the parent entity profile including context information comprising a plurality of types of categorization data;* (C4; L27-35: The company (i.e., entity/parent) profile includes demographic data, lists of affiliated companies, a list of permissions that users can be given, and a list of users who are allowed to manage the profile. These are examples of categorized data.)
- *providing an initial list including entity profiles corresponding to one or more entities related to the user;* (Appendix B: “select user”: user examines a list of users he may access (thus, the access permission provides how the entity is related to the user). As each user has a profile, the viewing of the user inherently comprises the user profile. Additionally, Appendix B at “company Organization” discloses that organizational information is used as an attribute of each user and is leverage by portal applications).
- *select an entity profile from the entity profiles included in the initial list;* (Appendix B: “select user”: user examines a list of users he may access)

- *importing at least a portion of the context information from the parent entity profile into the child entity profile, said imported context information comprising inherited context information belonging to the plurality of types of categorized data;* (C2; L42-48: relationships between parties are regulated to the extent that the relationship involves the portal-providing company's (i.e., an example of a parent company) information: thus, parent company information (i.e., context information) is provided (i.e., imported) to a child company thru the relationship. C2; L8-11: the interaction of the portal providing company and other companies results in presenting a "single coordinated image" while providing custom experiences for individual users, Thus describing the functionality such that context information is imported into a user profile such that the user views the "single coordinated image" while also having a custom experience (i.e., one that results from the user's preferences from the user's profile). C5; L38-50: "Once the permission has been given to a group it is automatically conferred on all members of that group...Any user who becomes a member of a group immediately acquires all the permissions that have been given to the group. The use of groups simplifies administration of permission by enabling a large number of permissions to easily be assigned by putting users in just a few groups." The "permissions" constitute an example of categorized context information from the plurality of types of categorized data listed at C4; L27-35 (The company (i.e., entity/parent) profile includes demographic data, lists of affiliated companies, a list of permissions that users can be given, and a list of users who are allowed to manage the profile. These are examples of a plurality of types of categorized data.) The step of immediately acquiring group permissions by users discloses the importing (i.e., transporting or inheriting) of the context information into the profile of the user. (C4; L35-41: A user profile includes demographic data, permissions and preferences, therefore, the user profile contains a plurality of types of categorized data. C4; L44-46: "the maximum permissions available to a user are limited by the permission assigned to the user's company" thus, the categorized data of permissions is imported and associated with the user's profile.) C7; L67-C8; L4: a selling partner of the portal-providing company can create personalized

branded web sites for its customers and can reuse (i.e., import) information available on the portal-providing company's portal.)

- *updating the inherited context information in the child entity profile in response to a change in the corresponding at least a portion of the context information in the parent entity profile.* (C4; L49-51: when company permissions are removed, all employee permissions are removed. A specific example of a context based permission that is updated is disclosed in C13; L21-34). Permissions are provided to modify profiles (C6; L40-50).

40. Howard explicitly discloses that permissions of a user are based on group or company permissions and are therefore imported/inherited from that parent. These permissions impact the accessibility of the user to various types of data. Howard does not explicitly disclose importing at least an additional type of data from an at least type of categorized data because this is accomplished by the permissioning.
41. Case discloses that a user profile is generated based on the job description of the user such that the interests and memberships associated with the user group having a particular job description are assigned to the user. (P[0033]). Roles have profiles that are included in the relevant user's profile. (P[0041-0042]). Case further discloses that all members of a team (i.e., people working on the same project) are assigned an identical profile. (P[0092]). This discloses importing categorized data that belongs to a group membership, an information need of the user, a project of the user and a task on the user.
42. Therefore, it would have been obvious to one of ordinary skill in the art at the time of the invention to have included explicitly importing other aspects of a profile to a user's profile, such as a group membership and a project, as disclosed by Case, in the system of Howard for the motivation of conveniently assigning certain interests and memberships of user groups as a function of their job description. (Case; P[0033]). Howard discloses that the user interface presented to a given user depends on the user's role and on user and company profiles. (C12; L38-41). Therefore, it is obvious to expand Howard to explicitly define that the permissioning that is imported to a user profile based on a role includes other profile information associated with the role.

43. Note: Though the Examiner has applied art to the category of authorization level, the various categories of data (qualifications, skills, preferences, authorization level, group memberships, informational needs, projects, tasks, taxonomies and accessed content) are **nonfunctional descriptive data** and are not functionally involved in the steps recited. **The importing of categorized data would be performed regardless of descriptions of the categories.** Thus, this descriptive data will not distinguish the claimed invention from the prior art in terms of patentability, *see In re Gulack*, 703 F.2d 1381, 1385, 217 USPQ 401, 404 (Fed. Cir. 1983); *In re Lowry*, 32 F.3d 1579, 32 USPQ2d 1031 (Fed. Cir. 1994).
44. Therefore, it would have been obvious to one of ordinary skill in the art at the time the invention was made to have included various specified categories of data because such data does not functionally relate to the steps in the method claimed and because the subjective interpretation of the names of the categories does not patentably distinguish the claimed invention.
45. Howard does not disclose *sending, by the processor, a notification to the user to indicate that new context information is available for updating into the user profile, wherein the identity inspector tool provides: a first option to the user to accept the new information for updating user profile based on the new information; a second option to the user to change the new information for updating the user profile based on the changed new information; and a third option to the user to add additional information to the new information for updating the user profile based on the additional information.*
46. Cheah discloses notification to the user that new information is available for importation into the user profile (C19; L19-22 and C25; L52-57). Options are presenter to the user to either accept the request to exchange (C19; L36-38) or to accept the request with limitation (C19; L64-65) where the user enters the limits for the exchange (C20; L2-5). The acceptance with adding limitations is the equivalent of the third option of adding additional information to the new information. Cheah further discloses that importing data from a database "results in substantial time savings" (C33; L46-49). Note: the process of importing new or additional data into the user profile results in updating the user profile with the imported information.

47. Therefore, it would have been obvious to one of ordinary skill in the art at the time of the invention to have included notification and options for updating as disclosed by Cheah, in the system of Howard for the motivation of providing a user control over additions to profile information. It is obvious to allow a user to control who has access to his contact information, therefore the options of allowing a user to determine to accept or accept with limitations afford that control. Notifications are obvious to ensure timely responses to requests.
48. Cheah does not explicitly disclose a user changing the new context information.
49. Waller discloses changing the format of data prior to importation (P[0166-0168]).
50. Therefore, it would have been obvious to one of ordinary skill in the art at the time of the invention to have included changing the new information, as disclosed by Waller, in the system of Cheah for the motivation of ensuring that all data remains in a consistent format. For example, it is obvious to ensure that phone information is stored in a consistent format as this enhances the user's ease of use of the data.
51. Howard does not disclose *refining the initial list based on a refining attribute to select an entity*.
52. Eisenhart, however, discloses a collaborative system with a match-making component where members browse a listing of members (P[0011]) and performs matching based on profile information and generates a list of matches that a user can select from. (P[0014]; [0054] and [0060]).
53. Therefore, it would have been obvious to one of ordinary skill in the art at the time of the invention to have included refining a list using a refining attribute, as disclosed by Eisenhart, in the system of Howard for the motivation of grouping individuals in order to work together on a task. (Howard; C1; L50-53). Howard discloses that a user can specify users to be members of a group based on a demographic profile (C5; L43-46), therefore a refining tool aids the user in matching users for selection based on the profile demographics.
54. Howard discloses collaboration among groups of individuals (C1; L50-53) and that users are selected to be part of a group based on profile demographics (C5; L43-46), thus collaborating comprises *using a portion of the context information included in the user profile*. This is also

disclosed at C13; L61-67 where permissions are applied through relationship definitions such that a chain of people have a relationship with respect to assembling and delivering content for a product brochure (i.e., *collaborative tasks defined in the workset*) but will not have a relationship with respect to a different set of activities.

55. Howard does not disclose *receiving an instruction to perform a collaborative task wherein the collaborative task is performed by collaborating with another user in the work environment or tracking progress of the task by implementing a dashboard in the user profile indicating whether a milestone associated with the task is complete.*
56. Eisenhart, however, discloses a secure collaboration manager with presentation interfaces and collaboration tools that store and retrieve information (i.e., an instruction is received to perform a collaborative task) (P[0049]). The secure collaboration manager coordinates functions that include information exchanges and transaction negotiations. The parties (i.e., the collaborating users) can use one user's secure collaboration area as a virtual office for sharing documents, running discussion threads and interacting with parties. (P[0086]). Thus, collaboration is performed *with another user in the work environment*. Eisenhart further discloses a deal tracker component that includes a negotiation manager. (P[0063]). The negotiation manager monitor templates include a listing of every deal (active and complete) and a status listing for all pending requests, etc. (P[0065-0082]). Thus, *tracking progress of the task and indicating whether a milestone is complete.*
57. Therefore, it would have been obvious to one of ordinary skill in the art at the time of the invention to have included performing a collaborative task by collaborating with another user in the work environment and tracking progress milestones, as disclosed by Eisenhart, in the system of Howard for the motivation of expanding Howard to include the functional requirements and benefits of a collaborative tool.
58. Eisenhart does not disclose a dashboard.
59. MacIntyre, however, discloses a dashboard that is updated with the latest information to depict progress toward key success factors. (P[0378-0382]).



60. Therefore, it would have been obvious to one of ordinary skill in the art at the time of the invention to have included a dashboard, as disclosed by MacIntyre, in the system of Eisenhart for the motivation of providing a workspace that allows real-time monitoring of multiple visualizations, metrics and dimensions. (Eisenhart; P[0379]).
61. **Claims 2 and 20:** Howard discloses explicitly associating context information relating to the user/child entity with the user/child entity profile. (C11; L9-11: the user profile includes preferences and C11; L37-41: the user purposely modifies the user preferences).
62. **Claims 3 and 21:** Howard discloses a configuration function that identifies and creates profiles for companies and employees. The configuration information is kept in a "portal management database 23". (C3; L11-19). Data is gathered from the database by a Java class library. (C3; L48-58). A *context cluster* is understood to be a compilation of data, such as found in database tables, therefore the functionality of the Java class library in gathering data is equivalent to creating a *context cluster*.
63. **Claim 4:** Howard discloses *transporting one or more context clusters into the user profile*. (C4; L45-51: the permissions of a user are limited to the permissions assigned to a company).
64. **Claims 9 and 22:** Howard discloses changing a company profile or modifying a user profile. (C6; L44-47 and C8; L20-37: a change in the company permissions leads to changing (i.e., updating) user permissions).
65. **Claims 10, 11, 23 and 24:** Howard discloses associating a portion of context information to a user profile by transporting at the context information into a profile. (See claims 1 and 14, above). Howard does not disclose generating an additional user profile for the user and switching between the two profiles based on a selection received from the user where the profiles are associated with different identities.
66. Eisenhart, however, discloses that the collaboration system allows a user to have more than one role and each member can create a separate profile for each role (thus the profiles are associated with two different identities). A "switch role" feature allows users to select a role. (P[0046]).

67. Therefore, it would have been obvious to one of ordinary skill in the art at the time of the invention to have included switching between two different profiles as disclosed by Eisenhart, in the system of Howard for the motivation of allowing user access and permissions based on the user's role. Howard discloses that permissions are applied through relationship definitions and as user relationships varying as dependent on the project, access will vary. (Howard; C13; L59-67). Thus, a user's role varies with the relationship. Further, Howard discloses that a user can have multiple job functions (Appendix B; "Job Function"). Therefore, it is obvious to allow a user to have more than one profile that is role or job function dependent and to allow the user to switch between the two.
68. **Claims 12 and 13:** Howard discloses collaborative and business relationships. (C13; L21-34).
69. **Claim 15:** Howard discloses *personalizing a work environment associated with user based on the context information associated with the user profile*. (C2; L56-67: a personal relationship portal that has custom appearances and behaviors for each of the employees).
70. **Claims 28, 30, 32 and 34:** Howard discloses an employer-employee relationship (C4; L52-55). Such a relationship is construed to be based on the activities, workset and collaboration of the user with the entity.
71. **Claims 35 and 36:** Howard does not disclose a decay function for deleting information based on a duration of time based on relevance of the information.
72. Case, however, discloses that an interest (part of the user profile (P[0044])) can be classified as having short, medium, or long term relevance and can be accompanied by an associated expiration data. (P[0045]).
73. Therefore, it would have been obvious to one of ordinary skill in the art at the time of the invention to have included timing the deletion of information based on the relevance of the information, as disclosed by Case, in the system of Howard for the motivation of ensuring that profiles contain relevant information.

74. **Claims 5-7 and 16-18** are rejected under 35 U.S.C. 103(a) as being unpatentable over Howard et al. (US Patent No. 6,697,865 hereafter referred to as "Howard") in view of Case et al. (US Pub. No. 2003/0154180, hereinafter referred to as "Case") in view of Cheah (US Pat. No. 7,003,546) in view of Waller et al. (US Pub. No. 2001/0047293, hereinafter referred to as "Waller") in view of Hosea et al. (US Pub. No. 2002/0138331 hereafter referred to as "Hosea").
75. **Claims 5, 6, 7, 16, 17 and 18:** Howard/Case discloses the limitations of claims 1 and 14. Howard does not disclose *links to services* and *information places*.
76. Hosea, however, discloses a system for personalizing Web pages to meet the interests of Web users based on user profiles. (Abstract). Hosea discloses links to "Yahoo! Shopping" (i.e., a service) and "News & Media" (information places) in Figure 11.
77. Therefore, it would have been obvious to one of ordinary skill in the art at the time the invention was made to have included links to services and information, as disclosed by Hosea in the system disclosed by Howard, for the motivation of providing a method of allowing the user to "more quickly and easily locate material that is most likely to be of interest" (Hosea; P[0050]).

### ***Response to Arguments***

Applicant's arguments with respect to claims 1, 14, 25 and 26 have been considered but are moot in view of the new ground(s) of rejection.

### ***Conclusion***

Any inquiry concerning this communication or earlier communications from the examiner should be directed to Gabrielle McCormick whose telephone number is (571)270-1828. The examiner can normally be reached on Monday - Thursday (5:30 - 4:00 pm).

If attempts to reach the examiner by telephone are unsuccessful, the examiner's supervisor, John Weiss can be reached on 571-272-6812. The fax phone number for the organization where this application or proceeding is assigned is 571-273-8300.

Information regarding the status of an application may be obtained from the Patent Application Information Retrieval (PAIR) system. Status information for published applications may be obtained from either Private PAIR or Public PAIR. Status information for unpublished applications is available through Private PAIR only. For more information about the PAIR system, see <http://pair-direct.uspto.gov>. Should you have questions on access to the Private PAIR system, contact the Electronic Business Center (EBC) at 866-217-9197 (toll-free). If you would like assistance from a USPTO Customer Service Representative or access to the automated information system, call 800-786-9199 (IN USA OR CANADA) or 571-272-1000.

/G. M./  
Examiner, Art Unit 3629

/JOHN G. WEISS/  
Supervisory Patent Examiner, Art Unit 3629